TOWN OF SOUTHAMPTO

TOWN CLERK

Sundy Schermeyer

- Manages Town Clerk office organizational functions, policies and staffing of operations in Town Hall Office and Records Management Center in Hampton Bays;
- Records Management Officer responsible for protecting and managing the paper and electronic records for 30-plus Town departments;
- Recording Secretary maintaining the agendas and minutes of Town Board meetings;
- Related correspondence with State and Local agencies and municipalities, and legislative filings of local laws with New York State;
- · Licensing and filing agent for New York State;
- Registrar of Vital Statistics for the unincorporated communities within the Township;
- Coordinates Historic Division's preservation and conservation projects of the Town's historic collection;
- Freedom of Information Officer for Town.

DEPUTY TOWN CLERK

Lisa Dunlap

- Maintains legislative files including inter-governmental, Town Board and inter-departmental correspondence, affidavits of publication, land use applications (moratorium exemptions, change-of-zones, PDD applications);
- Provides legislative support to Supervisor, Town Board and Department Heads;
- · Coordinates review, processing and electronic distribution of Town Board agendas;
- · Coordinates requirements for regular and special Town Board meetings;
- · Maintains and distributes "Communications" that are received in Town Clerk's Office;
- Prepares documents associated with home rule documents to Assembly and Senate, bonds, legal publication, local laws, liaison with bond counsel, maintains files;
- · Supervises processing of taxi and peddlers permits;
- · Coordinates notice of claims, subpoenas and litigation.

DEPUTY TOWN CLERK

Kim Ottati

- Supervises Town-wide bid process and related requirements; filing information, distribution, securities, legal ads, etc.;
- Assists with review, processing and electronic distribution of Town Board agendas and coordination of requirements for regular and special Town Board meetings:
- Coordinates the finalization of all adopted resolutions, creating and closing legislative files, required postings, affidavits, legal ads and printing of official record for vault;
- Maintains files, posts and circulates Fire Department officer elections, hearings and budget;
- Coordinates filing, acceptance, indexing and release of performance and maintenance bonds;
- Coordinates filings of financial disclosures with Town Attorney and Ethics Board.

CONFIDENTIAL SECRETARY

Erika Smith

- Special Events administration: review and assist with applications, phone inquiries, walkins, application distribution, report tracking, resolution preparation, issue permits;
- Monthly financial report for MaxxClerk Impact program: printing reports, resolving problems, preparing for distribution, P-card statement and bank reconciliations. Banking: Daily consolidation and balance transaction reports;
- Processes purchase orders and claim vouchers as necessary for contracts, supplies and equipment purchases;
- Town Board agenda distribution to internal depts, interested parties, CAC's, etc. Post to website. Provides support for legislative functions, as needed;
- · Liquor License renewals, distributes to departments and files reports;
- Backs up counter as needed daily (licenses, permits, Decals, Foils, general customer service, etc); Notary services.

TOWN CLERK'S OFFICE

2013 ORGANIZATIONAL CHART

DIVISIONS

VITAL STATISTICS/ PERMIT & LICENSES

SENIOR ACCOUNT CLERK TYPIST

Diane Carpenter

- Office intake manager, responsible for supervision and training of Counter staff of both offices for issuance of licenses and permits and general functions:
- Freedom of Information Law Coordinator for requests that are received for other departments;
- Coordinates with NYS agencies (Decals, Dept of Health, Vital Records) for licensing requests and marriage, birth, death corrections and amendments:
- Deputy Registrar of vital statistics issues death certificates and processes requests for certified copies;
- Oversees constituent's questions and directs to appropriate departments;
- Coordinates internal updates of General Code; Provides notary services;

SENIOR CLERK TYPIST

- Michele Orestis
- Answers phones and responds to constituent requests;
- Processes marriage affidavits/licenses, dog licenses, taxi operator business and vehicle licenses, peddler individual and vehicle licenses.
- Processes and inputs birth & death certificate information;
- Processes handicap and long term parking permits;
 Processes NYS Decals for hunting, salt & freshwater fishing;
- Processes (nt) Decais for numing, san & treshwarer fishing;
 Processes certified copies of requests for death, marriage and high certificates:
- Provides notary services:

PART TIME CLERK-TYPISTS

- Hampton Bays/Southampton (3)
 Performs customer service including answering phones, issuing
- handicapped permits as well as death certificates and marriage, dog, hunting and fishing licenses; Performs Data Entry of incoming records into Records Management
- Performs baild thinly of incoming records into Records Management database;
 Performs records purging and organization projects.
- Performs records purging and organization projects.

RECORDS MANAGEMENT

RECORDS CENTER MANAGER

Erin O'Connell

- Supervises and trains employees working in Records Center at Town Clerk's Annex in Hampton Bays;
- Oversees issuance of licenses and permits at Annex office;
 Maintains and operates Records Center facility and Records
- Maintains and operates Records Center facility and Reco Management database;
- Assesses all incoming records and assigns retention times to them;
 Assists departments with their Records Management needs through
- department visits and training;

 Works with State agencies to obtain and implement updated records policies;
- Performs continuous records inventories:
- Creates purging/disposition lists and carries out disposition of approved records.

RECORDS MANAGEMENT ASSISTANT

Maura Foreman

- Works on project to research, organize, link and scan all Building Department history records 1957-present;
- Fills record requests for Building Department files and other departments:
- Performs all property searches;
- Re-files returned records and interfiles new incoming documents;
- Performs data entry of items into Govern, Impact and Records Management software.
- Organizes and scans Assessor's discards performs all discard searches.

CLERK TYPIST Ted Salmon

- Working on project to organize, research, purge and scan all Land
- Mangement Records;
- Working on project to organize, research, and purge all Conservation records 1986-present;
 Fills all record requests for ZBA, Conservation and other files;
- Data Entry of incoming ZBA and Conservation records into Govern and Records Management database:
- Scans oversized documents from all departments (plans, surveys, etc);
- Works on condensing and interfiling projects with records from various departments:
- Helps with organization of boxes in Records Room.

HISTORIAN/ARCHIVES PART-TIME STAFF

HISTORIAN

- Zach Studenroth
- Directs and oversees the safekeeping of archival documents and materials;
- Appraises condition of permanent records and historically valuable documents and makes recommendations to the Town Clerk
- Participates in research activities, upon request, based on archival materials
- Analyzes documents for value to posterity within the Town;
- Does related work on special projects, displays, etc., as requested;
- Serves as an Ex-Officio member of Historic Landmarks Board;
- Prepares and maintains a comprehensive list of landmark buildings, historic structures and sites;
- Prepares an annual report of the work accomplished during the preceding year.

HISTORIC PROJECTS

Julian Shapiro

- Photographs delicate historic maps, records, deeds, and documents for on-going preservation project;
- Creates electronic images from photos with software for reproduction purposes and for offsite security storage;
- Indexes images, as they are created, to facilitate retrieval and future access.

ARCHIVES ASSISTANT

Lynette Pintauro

- Prepares reference aids such as indexing, guides, microfilming for historic collection:
- Current project to create finding aids for historic Town Highway Liber maps to facilitate public access for research purposes;
- Inventory organization and updating of information into Past Perfect software.

Department: Town Clerk

Budget Year: 2013 Cost Center #: 1410

Division: Town Clerk **Manager:** Sundy Schermeyer

Tax District: Full Town

Departmental Mission & Responsibilities:

The Office of the Town Clerk's mission is to improve access to government information, expedite application processes and find ways to further upgrade the office to be more effective and more efficient in our service delivery while reducing costs.

The Town Clerk continues to concentrate efforts on making efficiency upgrades to the Town business that is administered through this office. As a result, the office continues to reduce the processing time on everything from Freedom of Information requests and special events applications to taxi licenses, thus saving taxpayer time and money. The staff, previously needed to accomplish these tasks, has been reallocated to better serve our constituents.

A prime example of our effort to increase efficiency is our current method of electronic delivery of the thousands of letters and correspondence generated from the Town Board resolutions and legislation to the proper agencies and interested parties including community organizations. Electronic delivery has reduced delivery time, improved the public's ability to participate in our government and increased transparency while reducing staff resources, postage and printing costs. The Town Clerk also oversees the functions of Vital Statistics, Records Management, Archives and the Historic Division.

Workload:

The Office of the Town Clerk is responsible for accomplishing the following:

- 1. Preparing the Town Board agenda, attend and take official minutes at all Town Board meetings.
- 2. Maintaining the content of the Town Clerk Portal that allows interested parties to access information about Town Board meetings, agendas and adopted legislation.
- 3. Acting as custodian of all Town Records, as Records Management Officer, coordinating procedures for retention and maintenance of inactive records.
- 4. Maintaining originals and database for all Town contracts, leases, agreements and mortgages.
- 5. Processing change of zone/planned development district applications.
- 6. Administering a Town wide bid process, coordinate associated legal ads, track acceptance and release of maintenance and performance bonds.
- 7. Issuing licenses including, but not limited to, marriage, dog, taxi, hunting, fishing and games of chance.
- 8. Issuing permits including, but not limited to, handicap, long term parking and peddling.

Department: Town Clerk

Budget Year: 2013 Cost Center #: 1410

Division: Town Clerk **Manager:** Sundy Schermeyer

Tax District: Full Town

- 9. Overseeing the filing of Town budgets, annual financial reports, and school, ambulance and fire district budgets.
- 10. Processing claims, notices of defect, petitions and law suits against the Town.
- 11. Coordinating inter-municipal required filings and liquor license renewals.
- 12. Overseeing oaths of office and acceptance of all financial disclosures.

In 2011, the Town Clerk's Office administered and processed fifty-two (52) Town Board meetings; Regular meetings, Special meetings and Hampton Bays Water District meetings. Forty-eight (48) local laws were filed with the State, as a result of adopted legislation.

Over ten-thousand (10,000) licenses, permits and certificates were issued in 2011, including Special Event, handicap, long term parking permits, marriage, vital records, taxi, dog, hunting and fishing licenses.

The Town Clerk serves as the Records Management Officer overseeing the archived records of thirty two (32) Town Departments, as well as Freedom of Information Law (FOIL) officer and Marriage Officer.

Goals & Objectives:

An ongoing objective of the Town Clerk is to increase public access to government information. Using the Town website to make information that is of public interest readily available will continue to be a priority. The online bid packet and request for proposal system implemented by the Town Clerk's Office in cooperation with Information Technology has been a success, reducing bids picked up in person by close to 95% in the program's second year.

As legislation is reviewed and codes are updated requirements should be included for reports and applications of interest to be submitted electronically. This will increase public and internal access and allow interested parties to review reports on the Town's website.

Other goals include:

- 1. Continuing to streamline the office operations to increase efficiency in processing all licenses and applications with the use of new technological advances.
- 2. Continuing to find innovative ways to reduce the resources necessary to run the office to make our contribution to help reduce the Town's carbon footprint.

Department: Town Clerk

Budget Year: 2013 Cost Center #: 1410

Division: Town Clerk **Manager:** Sundy Schermeyer

Tax District: Full Town

Legal Authority:

The State mandate and/or Town Law, Section 30 establishing Town Clerk's Office.

PROPOSED 2013 SPECIAL EVENT AND PARADE PERMIT FEE SCHEULE

Special Event & Parade Application Fees (§283-5):

For parades and 1 day events with less than 250 people: \$50.00 per event day; \$25.00 per set up day

For events occurring over more than one day and/or events with 250 - 500 people: \$150.00 per event day; \$75.00 per set up day

For events occurring over more than one day and/or events with 500 - 1000 people: \$300.00 per event day; \$150.00 per set up day

For events occurring over more than one day and/or events with 1000 – 3000 people: \$500.00 per event day; \$250.00 per set up day

For events occurring over more than one day and/or events with more than 3000 people: \$1000.00 per event day; \$500.00 per set up day

Special Events held on parcels with PDD designation

For parades and 1 day events with less than 250 people: \$50.00 per event day; \$25.00 per set up day

For events occurring over more than one day and/or events with 250 - 500 people: \$100.00 per event day; \$50.00 per set up day

For events occurring over more than one day and/or events with more than 500 people: \$200.00 per event day; \$100.00 per set up day

Fee for amendment to application (§283-8):

Any amendment to the application for a parade or Special Event permit will be subject to an amendment fee of 25% of the applicable application fee. Amendments may include changes to the location, route, parking plan, number of people expected, etc. Amendments to Incident Action Plans or Parking Plans at the request of the Town are not considered amendments to the application.

Late Application Fee (§283-5):

Special Event & Parade Late Application Fee: \$10/per day beyond the submission deadline in §283-2B. If more than 60 days late and application is accepted \$20/per day.

<u>Liability Insurance (§283-3A):</u>

Pursuant to §283-3A, the applicant and/or property owner shall furnish the Town with a comprehensive liability insurance policy, naming the Town as an additional insured, in the amount of the Town's self-insured retention, which is currently \$1,000,000.00 General Aggregate and Each Occurrence. Also pursuant to §283-3A, if serving alcohol at an event, Liquor Liability Insurance Policy naming the Town as an additional insured in the amount of the \$1,000,000.00 General Aggregate and Each Occurrence, will also be required.

Appeal Fee (§283-9B):

Appeal before Public Safety Commission: \$150/per application

Cost Reimbursement (§283-3B):

Chapter 283 allows for cost reimbursement to the Town for all necessary staffing at an event or parade. Applicants will be billed at the highest going rate and highest overtime rate for any Police Officer, Traffic Control Officer, Traffic Control Specialist, Police Officer, Captain, Detective, Fire Marshal, Code Enforcement Officer, or Highway Department employee used at the event or parade. Also, applicants will be billed a 28% surcharge to reflect salary contributions towards FICA, Medicare, Workers Compensation, and retirement.

Employee Compensation & Benefits Schedule

-		Base			Total	Medical	Employer		Other		Total Comp. &
Position	Class/Grade/Step	Salary	Longevity Ot	her Comp	Comp	Benefits	FICA	Retirement	Benefits 10	tal Benefits	Benefits
Town Clerk											
Town Clerk Summary											
Town Clerk - 1410											
Confidential Secretary	ADMINSUPPORT	53,060	0	0	53,060	19,854	4,059	7,163	351	31,427	84,488
Deputy Town Clerk	ADMINSUPPORT	72,090	0	1,500	73,590	1,299	5,630	9,935	472	17,336	90,925
Deputy Town Clerk	ADMINSUPPORT	83,347	0	0	83,347	19,854	6,376	11,252	536	38,017	121,364
Senior Clerk Typist	CSEA40HOUR-NEW / C / 5	43,994	1,732	0	45,726	19,988	3,498	6,173	302	29,961	75,687
Senior Account Clerk Typist	CSEA40HOURPROMO	70,700	7,070	2,366	80,136	22,269	6,130	10,818	491	39,708	119,843
Town Clerk	ELECTOFFICIALS	97,000	0	0	97,000	19,854	7,650	13,500	629	44,632	141,632
Clerk Typist	PART-TIME	13,720	0	0	13,720	0	1,050	0	112	1,162	14,882
Total Town Clerk - 1410	•	433,911	8,802	3,866	446,579	103,117	34,393	58,841	2,893	202,243	648,822

Town Clerk - 1410

Account Code	Description	2011 Adopted Budget	2011 Actual	2012 Adopted Budget	2012 Amended Budget	2012 Oct YTD Actual	2013 Requested Budget	2013 Tentative Budget	2013 Preliminary Budget	2013 Adopted Budget	2013 Adopted /2012 Amended Difference	2013 Adopted / 2012 Amended % of Change	2014 Requested Budget	2014 Tentative Budget	2014 Preliminary Budget	2014 Adopted Budget
	Real Property Taxes:															
1001	Property Taxes	497,888	498,698	464,646	464,488	464,488	479,590	479,590	479,590	479,590	15,103	3.25%	485,568	490,645	490,645	490,645
	Total Real Property Taxes	497,888	498,698	464,646	464,488	464,488	479,590	479,590	479,590	479,590	15,103	3.25%	485,568	490,645	490,645	490,645
	Other Revenue:															
1255	Town Clerk Fees	90,000	95,070	107,500	107,500	86,658	91,000	91,000	91,000	91,000	(16,500)	(15.35%)	107,500	107,500	107,500	107,500
2544	Dog Licenses	9,000	13,536	14,000	14,000	9,175	10,000	10,000	10,000	10,000	(4,000)	(28.57%)	10,000	10,000	10,000	10,000
2551	Taxi Permits	40,000	50,575	66,000	66,000	82,550	90,000	90,000	90,000	90,000	24,000	36.36%	66,000	66,000	66,000	66,000
2554	LT Parking Permits	10,000	9,486	16,000	16,000	7,438	13,000	13,000	13,000	13,000	(3,000)	(18.75%)	16,000	16,000	16,000	16,000
2770	Miscellaneous	0	15	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
5031	Interfund Transfer - Revenue	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	0_	0.00%	10,000	10,000	10,000	10,000
	Total Other Revenue	159,000	178,682	213,500	213,500	195,820	214,000	214,000	214,000	214,000	500	0.23%	209,500	209,500	209,500	209,500
	Total Revenue	656,888	677,380	678,146	677,988	660,308	693,590	693,590	693,590	693,590	15,603	2.30%	695,068	700,145	700,145	700,145
	Salaries:															
6100	Salaries	407,241	407,241	414,300	414,300	345,250	420,191	420,191	420,191	420,191	(5,892)	(1.42%)	422,485	426,655	426,655	426,655
6103	Accumulated Sick/Personal Days	736	244	1,324	1,166	1,154	2,366	2,366	2,366	2,366	(1,200)	(102.94%)	2,366	2,366	2,366	2,366
6105	Part Time Salaries	7,997	6,275	13,720	13,720	8,894	13,720	13,720	13,720	13,720	0	0.00%	13,720	13,720	13,720	13,720
6110	Longevity	6,797	6,796	6,959	6,959	0	8,802	8,802	8,802	8,802	(1,843)	(26.49%)	8,802	8,802	8,802	8,802
6113 6127	Other Pay Cash in Lieu of Health Benefits	3,000 2.500	3,000	3,000 1.500	3,000 1.500	2,500 750	3,000 1.500	3,000 1.500	3,000 1.500	3,000 1.500	0	0.00%	3,000	3,000 1.500	3,000 1.500	3,000 1.500
6127	Total Salaries	<u>2,500</u> 428,271	2,500 426,057	440,802	440,644	358,547	449,579	449,579	449,579	449,579	(8,935)	(2.03%)	1,500 451,873	456,043	456,043	456,043
		420,271	420,037	440,002	440,044	336,347	449,579	449,579	449,579	449,579	(0,933)	(2.03%)	451,675	450,045	450,045	430,043
0010	Employee Benefits - Current:	48,332	47.000	E2 20E	F0 00F	44.400	E0.044	E0 044	E0.044	E0.044	(F. 4FC)	(10.000()	E0 4E4	F0 74.4	FO 714	FO 74.4
6810 6830	Employee Retirement - Active FICA Tax Expenditure	48,332 32,763	47,088 32,492	53,385 33,721	53,385 33,721	44,488 26,886	58,841 34,393	58,841 34,393	58,841 34,393	58,841 34,393	(5,456) (671)	(10.22%)	59,151 34,568	59,714 34,887	59,714 34,887	59,714 34,887
6835	MTA Tax	32,763 0	32,492 0	1,499	1,499	1,196	1,529	1,529	1,529	1,529	(30)	(2.00%)	1,536	1,551	1,551	1,551
6840	Worker's Compensation	1.982	2,201	1,433	1,493	891	1.163	1,163	1,163	1,163	(16)	(1.39%)	1,169	1,180	1.180	1,180
6860	Medical Insurance - Active Employees	88,679	88,867	91,060	91,060	71,040	95,320	95,320	95,320	95,320	(4,260)	(4.68%)	95,320	95,320	95,320	95,320
6865	Dental & Optical	6,480	6,346	7,355	7,355	5,494	7,796	7,796	7,796	7,796	(441)	(6.00%)	6,497	6,497	6,497	6,497
6875	Disability	202	150	202	202	120	202	202	202	202	Ó	0.00%	202	202	202	202
	Total Employee Benefits - Current	178,437	177,144	188,369	188,369	150,114	199,243	199,243	199,243	199,243	(10,875)	(5.77%)	198,443	199,350	199,350	199,350
	Total Employee Costs	606,708	603,202	629,171	629,013	508,661	648,822	648,822	648,822	648,822	(19,810)	(3.15%)	650,316	655,393	655,393	655,393
	Contractual:															
6401	Contracts	1,000	1,327	900	864	690	880	880	880	880	(16)	(1.85%)	880	880	880	880
6403	Gasoline	800	774	800	793	578	800	800	800	800	(7)	(0.88%)	784	784	784	784
6406	Repair Equipment	200	299	200	404	221	196	196	196	196	208	51.49%	196	196	196	196
6411	Printing and Stationery	6,500	6,769	5,500	5,317	1,225	5,500	5,500	5,500	5,500	(183)	(3.44%)	5,500	5,500	5,500	5,500
6412	Publications Travel Dues and Polated	18,000 1.200	15,831 1.167	16,000	16,000 775	7,273 476	15,680 1.176	15,680 1.176	15,680	15,680	320	2.00%	15,680 1.176	15,680 1.176	15,680	15,680 1.176
6416	Travel, Dues and Related	1,200	1,107	1,200	//5	4/0	1,170	1,170	1,176	1,176	(401)	(51.74%)	1,170	1,170	1,176	1,170

Town Clerk - 1410

Account Code	Description	2011 Adopted Budget	2011 Actual	2012 Adopted Budget	2012 Amended Budget	2012 Oct YTD Actual	2013 Requested Budget	2013 Tentative Budget	2013 Preliminary Budget	2013 Adopted Budget	2013 Adopted / 2012 Amended Difference	2013 Adopted / 2012 Amended % of Change	2014 Requested Budget	2014 Tentative Budget	2014 Preliminary Budget	2014 Adopted Budget
6421	Legal Notices	12,000	12,107	12,000	12,000	5,606	11,760	11,760	11,760	11,760	240	2.00%	11,760	11,760	11,760	11,760
6423	Small Equipment (Non-Capital	0	1,657	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
6425	Office Supplies	1,200	1,101	1,200	1,222	1,222	1,176	1,176	1,176	1,176	46	3.76%	1,176	1,176	1,176	1,176
6451	Document Restoration	2,500	2,300	2,500	2,925	0	2,500	2,500	2,500	2,500	425	14.53%	2,500	2,500	2,500	2,500
6477	Copier Leases	6,780	7,274	8,675	8,675	5,566	5,100	5,100	5,100	5,100	3,575	41.21%	5,100	5,100	5,100	5,100
	Total Contractual	50,180	50,607	48,975	48,975	22,856	44,768	44,768	44,768	44,768	4,207	8.59%	44,752	44,752	44,752	44,752
	Total Expenditures	656,888	653,809	678,146	677,988	531,517	693,590	693,590	693,590	693,590	(15,603)	(2.30%)	695,068	700,145	700,145	700,145
	Net Surplus (Deficit)	0	23,571	0	0	128,791	0	0	0	0			0	0	0	0

Department: Records Management

Budget Year: 2013 Cost Center #: 1460

Division: Town Clerk **Manager:** Sundy Schermeyer

Tax District: Full Town

Departmental Mission & Responsibilities:

The Records Management Center maintains a complete record inventory of all files, takes measures to preserve historical records while instituting a professional, consistent records management program according the adopted New York State MU-1 schedule for retention and disposition of the Town's records.

Records Management is also responsible for the following:

- 1. Development of policies and procedures for classifying, indexing and filing archives to provide the Town with an organized, effective records management program.
- 2. Establishing and publishing reference information for distribution to Records Access Officers to promote a cooperative effort in providing support for the Town's records management program.
- 3. Providing training to Records Access Officers to ensure the policies and procedures are manageable in each department and identifying any special circumstances or individual department needs.
- 4. Storing the inactive records of Town government in an orderly and efficient manner.
- 5. Identifying and disposing of records that have reached the end of their retention period according to the NYS MU-1 schedule.

Department: Records Management

Budget Year: 2013 Cost Center #: 1460

Division: Town Clerk Manager: Sundy Schermeyer

Tax District: Full Town

Workload:

By law, the Town Clerk serves as the Records Management Officer and is responsible for the coordination and oversight of the implementation of both a paper and electronic records management program. The Records Center located in the Hampton Bays Community Center serves as the Town's depository for records archived according to the adopted NYS MU-1 Retention and Disposition Schedule.

The Records Management Office currently serves as an Annex to the Town Clerk's main office located in Southampton. Records Management is responsible for performing the following tasks:

- 1. Retrieval and daily transport of internal Town departmental requests and for archived records from Records Center to Southampton Town Hall.
- 2. Researching Freedom of Information applications including: gathering related documents, copying or scanning, when possible, and sending same to the the Southampton Office.
- 3. Establishing and maintaining a program for Departmental Records Access Officers to provide supervision of their input to Records Management Program of writing records, transferring index lists as they prepare their records for archiving.
- 4. Maintenance and continual updating of the Records Management database to track the movement of records throughout the Town to ensure timely access to archived records.
- 5. The office serves as an Annex to the Town Clerk's Main Office. It is open two (2) days a week to provide services to the western section of the Town including: issuing licenses and permits. It also serves as an intake office for those wanting to do Town business but are unable to travel to Southampton.

Department: Records Management

Budget Year: 2013 Cost Center #: 1460

Division: Town Clerk **Manager:** Sundy Schermeyer

Tax District: Full Town

Goals & Objectives:

1. Continue the incorporation of the electronic documents into the adopted New York State MU-1 schedule to continue to effectively manage the Town's records. The Electronic Document Management Software System (EDMS) Records Management introduced, allows departments to categorize, index, identify originals from duplicates and assign retention schedules. The electronic records, which also include email need to follow the same schedule as the paper records that the Town maintains in its records management center and this EDMS system assists the Town in accomplishing that goal. Continue the implementation of the EDMS system to locate electronic records that are not currently maintained in an organized easily locatable format.

- 2. Write a grant application to acquire financial support to continue digitization of the Land Management records to incorporate the records into the Govern software system. This project will increase internal and public access and ultimately reduce staff resources required to respond to requests for this record series.
- 3. Provide periodic training to Records Access Officers to ensure the policies and procedures in each department are manageable and identify any special circumstances or needs individual department may have.
- 4. Working with the Historic Division, publish procedures that contain criteria for evaluating documents being prepared for archives for historical significance and incorporate this information into training provided to Records Access Officers. Publish guidelines for emergency management developed from grant project.
- 5. Continue to streamline the operations of the Records Management Center to increase efficiency and improve response times to records requests.
- 6. Complete digitization of oversized archive maps using the large scanner acquired with NYS Dept of Education grant to increase access and free up valuable records storage space.

Legal Authority:

Records Management was established in the Town Clerk's Office, per Resolution adopted June 26, 1993.

Employee Compensation & Benefits Schedule

Position	Class/Grade/Step	Base Salary	Longevity Othe	er Comp	Total Comp	Medical Benefits	Employer FICA	Retirement	Other Benefits To	tal Benefits	Total Comp. & Benefits
Town Clerk											
Records Management - 1460											
Records Service Manager	ADMINSUPPORT	61,915	0	0	61,915	9,792	4,737	8,359	405	23,292	85,207
Clerk	PART-TIME	6,750	0	0	6,750	0	516	0	70	586	7,336
Clerk Typist	PART-TIME	12,180	0	0	12,180	0	932	0	103	1,035	13,215
Total Records Management - 1	460	80,845	0	0	80,845	9,792	6,185	8,359	578	24,913	105,758

Records Management - 1460

Account Code	Description	2011 Adopted Budget	2011 Actual	2012 Adopted Budget	2012 Amended Budget	2012 Oct YTD Actual	2013 Requested Budget	2013 Tentative Budget	2013 Preliminary Budget	2013 Adopted Budget	2013 Adopted / 2012 Amended Difference	2013 Adopted / 2012 Amended % of Change	2014 Requested Budget	2014 Tentative Budget	2014 Preliminary Budget	2014 Adopted Budget
	Real Property Taxes:															
1001	Property Taxes	148,501	149,347	109,908	109,908	109,908	110,518	110,518	110,518	110,518	610	0.55%	110,618	112,125	112,125	112,125
	Total Real Property Taxes	148,501	149,347	109,908	109,908	109,908	110,518	110,518	110,518	110,518	610	0.55%	110,618	112,125	112,125	112,125
	Other Revenue:															
5031	Interfund Transfer - Revenue	119,963	119,963	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
	Total Other Revenue	119,963	119,963	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
	Total Revenue	268,464	269,310	109,908	109,908	109,908	110,518	110,518	110,518	110,518	610	0.55%	110,618	112,125	112,125	112,125
	Salaries:															
6100	Salaries	177,118	177,118	60,701	60,701	50,584	61,915	61,915	61,915	61,915	(1,214)	(2.00%)	61,915	63,153	63,153	63,153
6105	Part Time Salaries	12,496	11,050	20,612	20,612	9,121	18,930	18,930	18,930	18,930	Ì,682	8.16%	18,930	18,930	18,930	18,930
6110	Longevity	3,250	4,095	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
6127	Cash in Lieu of Health Benefits	2,500	2,500	0	0	0	0	0	0	0	0	0.00%	0	0	0	0
	Total Salaries	195,364	194,763	81,313	81,313	59,705	80,845	80,845	80,845	80,845	468	0.58%	80,845	82,083	82,083	82,083
	Employee Benefits - Current:															
6810	Employee Retirement - Active	22,467	20,624	7,588	7,588	6,323	8,359	8,359	8,359	8,359	(771)	(10.16%)	8,359	8,526	8,526	8,526
6830	FICA Tax Expenditure	14,945	14,849	6,220	6,220	4,506	6,185	6,185	6,185	6,185	36	0.58%	6,185	6,279	6,279	6,279
6835	MTA Tax	0	0	276	276	199	275	275	275	275	2	0.58%	275	279	279	279
6840	Worker's Compensation	904	1,005	218	218	169	217	217	217	217	1	0.58%	217	220	220	220
6860	Medical Insurance - Active Employees	25,020	24,981	8,180	8,180	6,328	8,492	8,492	8,492	8,492	(312)	(3.82%)	8,492	8,492	8,492	8,492
6865	Dental & Optical	4,320	4,231	1,226	1,226	916	1,299	1,299	1,299	1,299	(74)	(6.00%)	1,299	1,299	1,299	1,299
6875	Disability	144	53	86	86	70	86	86	86	86	(1.110)	0.00%	86	86	86	86
	Total Employee Benefits - Current Total Employee Costs	67,800 263,164	65,743 260,505	23,795 105,108	23,795 105,108	18,510 78,215	24,913 105,758	24,913 105,758	24,913 105,758	24,913 105,758	(1,118) (650)	(4.70%) (0.62%)	24,913 105,758	25,182 107,265	25,182 107,265	25,182 107,265
	Equipment:	_00,.0.	_00,000	.00,.00	,	70,2.0	.00,,.00	100,700	100,700	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	(333)	(0.02.0)	100,700	107,200	.07,200	.07,200
6200	Equipment	800	800	800	800	502	0	0	0	0	800	100.00%	0	0	0	0
	Total Equipment	800	800	800	800	502	0	0	0	0	800	100.00%	0	0	0	0
	Contractual:															
6401	Contracts	800	764	800	800	252	800	800	800	800	0	0.00%	900	900	900	900
6419	Microfilming	2,500	2,500	2,000	2,000	0	2,000	2,000	2,000	2,000	0	0.00%	2,000	2,000	2,000	2,000
6425	Office Supplies	1,200	1,186	1,200	1,200	768	1,176	1,176	1,176	1,176	24	2.00%	1,176	1,176	1,176	1,176
6426	Supplies - Other	0	0	0	0	0	784	784	784	784	(784)	(100.00%)	784	784	784	784
	Total Contractual	4,500	4,450	4,000	4,000	1,020	4,760	4,760	4,760	4,760	(760)	(19.00%)	4,860	4,860	4,860	4,860
	Total Expenditures	268,464	265,755	109,908	109,908	79,737	110,518	110,518	110,518	110,518	(610)	(0.55%)	110,618	112,125	112,125	112,125
	Net Surplus (Deficit)	0	3,555	0	0	30,171	0	0	0	0			0	0	0	0

Department: Archives & Historian

Budget Year: 2013 Cost Center #: 7520

Division: Town Clerk **Manager:** Sundy Schermeyer

Tax District: Full Town

Departmental Mission & Responsibilities:

The mission of the Historic Division of the Town Clerk's Office is to preserve and protect the Town's historic holdings from elements that compromise their integrity, including the passage of time, while taking initiatives to improve the public's access to the historic collection. The records contain a significant amount of information that is of great interest to researchers, historic organizations and government agencies. It is our responsibility to provide access to those that seek this information and in order to do that effectively, we need to continue the digitization projects that are in progress. These projects have already proven their value in our ability to respond in a timely manner to past requests for information by the Department of the Interior (DOI). We provided the DOI the ancient records requested electronically on a disc and they complimented the Historic Division for our efforts in protecting and preserving our historic documents, while providing access and facilitating research. The DOI further stated that they wish other states and municipalities would take the same initiatives and follow our lead.

Time is of the essence when it comes to the preservation of some of the more fragile holdings. The projects in progress, in the Historic Division, have proven invaluable for accomplishing this goal and will be continued to completion.

Workload:

The Historic Division maintains the Town's historic holdings, which is comprised of a collection of archives, records and artifacts. The inventory and appraisal of the items in the collection used to determine the needs and appropriate methods for their conservation and preservation is an ongoing project of utmost importance.

The Historic Division has been working on several important projects to catalog and link information that are intended to aid in improving access to facilitate research and requests for genealogy searches. With limited resources and staff, it is essential to continue efforts to organize the information in the collection to make it less time consuming to respond to requests.

The Historic Division has been working on an ongoing project of photographing the most fragile documents in our possession, which accomplishes many goals, including the preservation of the Town's history in the event of a catastrophe, electronic access and ability to create reproductions that can be handled by the public. In a similar effort, we have also been scanning our transcribed volumes of the Town's historic record books. In addition, we are also posting the transcribed record books on our website. With the use of Optical Character Recognition, the electronic versions of the Town's volumes are now searchable, a major breakthrough for improving access to the Town's historic records and in turn, reducing the reliance on Town staff to process and fulfill those requests.

Department: Archives & Historian

Budget Year: 2013 Cost Center #: 7520

Division: Town Clerk Manager: Sundy Schermeyer

Tax District: Full Town

Goals & Objectives:

To complete the digitization of the Town's historic holdings to preserve and protect them in order to ensure that many generations to come will be able to enjoy the heritage and historic treasures of the Town of Southampton.

The entire collection of the Town's record books has now been posted on the Town's website. The majority of the Town's records are transcribed in these record books and the completion of this project has significantly increased the public's ability to do their own research, including genealogy searches.

To expand the historic section of the website to include electronic copies of transcriptions and maps that are held in the Town's historic collection. Lack of any full time staff resources dedicated to this division has prevented the Town's archive from being a viable research destination; resources directed to expand offerings will be cost effective by facilitating public research.

To continue the development of a comprehensive approach to the preservation and conservation of the Town's historic collection by establishing procedures and policies for the evaluation of current archives for historical significance. This includes providing criteria and information on how to accomplish this goal for use in training and developing cataloguing policies for intake of identified items.

Legal Authority:

Town Law.

NOTES:

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Employee Compensation & Benefits Schedule

		Base			Total	Medical	Employer		Other		Lotal
Position	Class/Grade/Step	Salary	Longevity Other	er Comp	Comp	Benefits	FICA	Retirement	Benefits To	tal Benefits	Benefits
Town Clerk											
Archives & Historian - 7520											
Secretarial Assistant	PART-TIME	7,700	0	0	7,700	0	589	0	76	665	8,365
Town Historian	PART-TIME	20,000	0	0	20,000	0	1,530	2,700	763	4,993	24,993
Total Archives & Historian - 752	20	27,700	0	0	27,700	0	2,119	2,700	838	5,657	33,357

2013 Adopted Budget Archives & Historian - 7520

Account Code	Description	2011 Adopted Budget	2011 Actual	2012 Adopted Budget	2012 Amended Budget	2012 Oct YTD Actual	2013 Requested Budget	2013 Tentative Budget	2013 Preliminary Budget	2013 Adopted Budget	2013 Adopted / 2012 Amended Difference	2013 Adopted / 2012 Amended % of Change	2014 Requested Budget	2014 Tentative Budget	2014 Preliminary Budget	2014 Adopted Budget
	Real Property Taxes:															
1001	Property Taxes	61,924	63,827	64,063	44,581	44,581	37,432	37,432	37,432	37,432	(7,149)	(16.04%)	38,314	38,314	38,314	38,314
	Total Real Property Taxes	61,924	63,827	64,063	44,581	44,581	37,432	37,432	37,432	37,432	(7,149)	(16.04%)	38,314	38,314	38,314	38,314
	Total Revenue	61,924	63,827	64,063	44,581	44,581	37,432	37,432	37,432	37,432	(7,149)	(16.04%)	38,314	38,314	38,314	38,314
	Salaries:															
6100	Salaries	18,217	18,217	18.582	6.194	6.194	0	0	0	0	6.194	100.00%	0	0	0	0
6105	Part Time Salaries	20,000	25,482	25,376	25,376	16,643	27,700	27,700	27,700	27,700	(2,324)	(9.16%)	27,700	27,700	27,700	27,700
	Total Salaries	38,217	43,699	43,958	31,570	22,837	27,700	27,700	27,700	27,700	3,870	12.26%	27,700	27,700	27,700	27,700
	Employee Benefits - Current:															
6810	Employee Retirement - Active	2,095	3,803	4,823	3,574	2,957	2,700	2,700	2,700	2,700	874	24.45%	2,700	2,700	2,700	2,700
6830	FICA Tax Expenditure	2,924	3,328	3,363	2,415	1,726	2,119	2,119	2,119	2,119	296	12.25%	2,119	2,119	2,119	2,119
6835	MTA Tax	0	0	149	107	72	94	94	94	94	13	12.31%	94	94	94	94
6840	Worker's Compensation	850	1,466	730	697	541	686	686	686	686	11	1.51%	686	686	686	686
6860	Medical Insurance - Active Employees	6,888	6,903	6,756	2,252	2,102	0	0	0	0	2,252	100.00%	0	0	0	0
6865	Dental & Optical	410	402	466	155	139	0	0	0	0	155	100.00%	0	0	0	0
6875	Disability	40	66	69	62	41	58	58	58	58	4	6.37%	58	58	58	58
	Total Employee Benefits - Current	13,207	15,968	16,356	9,262	7,578	5,657	5,657	5,657	5,657	3,604	38.92%	5,657	5,657	5,657	5,657
	Total Employee Costs	51,424	59,667	60,313	40,831	30,415	33,357	33,357	33,357	33,357	7,474	18.30%	33,357	33,357	33,357	33,357
	Contractual:															
6401	Contracts	10,000	4,133	3,250	3,235	2,608	3,185	3,185	3,185	3,185	50	1.55%	4,067	4,067	4,067	4,067
6416	Travel, Dues and Related	0	0	0	0	0	400	400	400	400	(400)	(100.00%)	400	400	400	400
6425	Office Supplies	500	515	500	515	515	490	490	490	490	25	4.85%	490	490	490	490
	Total Contractual	10,500	4,648	3,750	3,750	3,123	4,075	4,075	4,075	4,075	(325)	(8.67%)	4,957	4,957	4,957	4,957
	Total Expenditures	61,924	64,315	64,063	44,581	33,537	37,432	37,432	37,432	37,432	7,149	16.04%	38,314	38,314	38,314	38,314
	Net Surplus (Deficit)	0	(489)	0	0	11,044	0	0	0	0		_	0	0	0	0